**Department of Revenue**
**Property Tax Credit and Replacement Claims**
**Design Event**

# "Credit Crusaders"

July 23 - 25, 2013

# The Opportunity

Courtney Kay-Decker
Department of Revenue

# The "Credit Crusaders" Team
**Susan Chambers**



**Julie Roisen-IDR, Susan Chambers-IDR, Eric Abrams-DOT, Casey Kohrt-DNR, Patrick Wilke-Brown-DNR, Jodi Flory-LSA, Matthew Harshbarger-DAS ITE, Jennifer Kuntz-DAS ITE, Jon Paoli-Homeland Security, Lucas Beenken-ISAC, Deb Dotzenrod-IDR, Carrie Johnson-DOM, Mike Rohlf-IDR, Marcia Tope-DOM**

# Scope
**Deb Dotzenrod**

- This event will define the request, construction, and sharing process to manage a statewide parcel inventory, classed for property tax purposes as commercial, industrial, and railroad for calculation of business property tax credit and replacement claims annually.

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# Objectives
**Jodi Flory**

1. What data is necessary
2. How should the data be standardized
3. How do we get the data
4. How do we store the data:  short term, long term
5. Define the framework for the requirements for a hardware and software request: short term, long term
6. Define the data elements required specific to the calculation and the import and extractions necessary
7. Define the stakeholders and requirements for reporting to them

# Objectives
**Patrick Wilke-Brown**

8. How do we archive the data: short term long term
9. How do we manage corrections or denials
10. How do we report corrections or denials
11. What are the resource staffing needs
12. Determine the strategy for communicating the requirements to local officials
13. Define what and how we will share with other agencies
14. Define what's already being requested of the local entities by state agencies

# Lean Methodology
**Mike Rohlf**

- Clear objectives
- Team process
- Tight focus on time
- Quick & simple
- Necessary resources immediately available
- Immediate results (new process designed by end of week)

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# Trends
**Lucas Beenken**

- Decrease in taxable values in some areas impacts budgets/resources.
- Tax reform
- Government consolidation
- Data privacy
- Adoption of geospatial
- Changes in TIF
- Potential for other tax credit
- Vendors may not have resources/time

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# SWOT
**Carrie Johnson**

## Strengths

- Most counties already have a starting data set
- Collaboration
- Professionalism at local and state level to serve tax payers
- Law back-ups process
- Adaptability
- Strength of local organizations

# SWOT
**Eric Abrams**

## Weaknesses

- Different definitions
- Diversity of systems
- Reliance on ITE
- Communication with 99 counties
- Lack of expertise in GIS
- Ongoing expense
- Short timeframe to develop process and turnaround for data

# SWOT

**Eric Abrams**

## Opportunities

- One "ask" for data

- Interests across government to utilize same data

- Elimination of data redundancy

- Greater ability for analysis, collaboration, predictability

- IDR to get secure web portal

- IDR could rethink entire system (business process)

- Validate "clean" data

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# SWOT
**Jennifer Kuntz**

## Threats

- Time is short
- Lack of communication through the process
- Increase in appeals/audits
- Legislative changes
- Dependence on all of the "players" to get it all done timely
- Values decrease and Taxes increase

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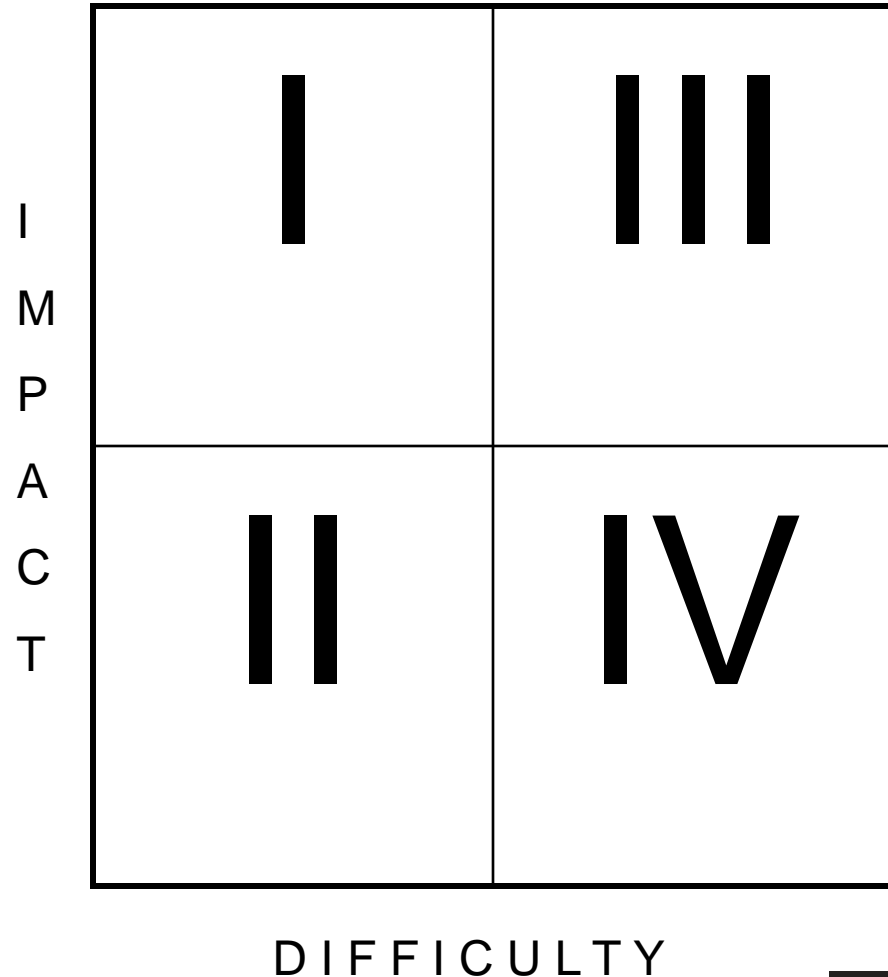
# Brainstorming

**Matthew Harshbarger**

➢ Identify data elements to be provided

➢ Standard definitions

➢ Standardized data

➢ Timeline

➢ Presentations to affiliates

➢ Training sessions

➢ Secure file exchange

➢ Data delivery option: Tabular; GIS; Electronic File

➢ Polygons and parcel data not contain in parent parcel (points etc.)

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# De-selection Process

**Matthew Harshbarger**

- Identifies
  - Impact to customer
  - Difficulty implementing

- Helps to rate/ rank solutions to resolve issues while identifying ease of implementation

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            M     |      I          III
            P     |
            A  ---+---------------------
            C     |
            T     |     II          IV

                    D I F F I C U L T Y
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# Structured Timeframe

**Jewels Roisen**

We laid the framework for the property tax credit and replacement claims process……

**Phase 1 – Data collection**

**Phase 2 – Data design, development, and build**

**Phase 3 – Data template delivery**

**Phase 4 – Test**
    **Phase 4.1 – Re-Test**

**Phase 5 - Production**

# Homework
**Matthew Harshbarger**

| Item | Item Description | Person Responsible | Due Date |
|------|------------------|--------------------|----------|
| 1 | Develop communication plan | Jewels | 30 days |
| 2 | Identify data exchange system | Jewels, Lucas | 30 days |
| 3 | Define state data requirements for tax info | Jewels | 90 days |
| 4 | Communication with ISAC working group | Jewels, Lucas | 30 days |
| 5 | Local government definition process for file provisions IDR/DOM | Carrie | 30 days |
| 6 | Determine hardware needs | Jennifer | 30 days |
| 7 | Develop appropriate contact list for communication | Susan/Deb | 30 days |

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# Team Member Experience

**Lucas Beenken, ISAC**

**Susan Chambers, IDR**

**Jewels Roisen, IDR**

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# Comments

- **Marcia Tope, Department of Management**

- **Mike Rohlf, Department of Revenue**

# We welcome your questions and comments!